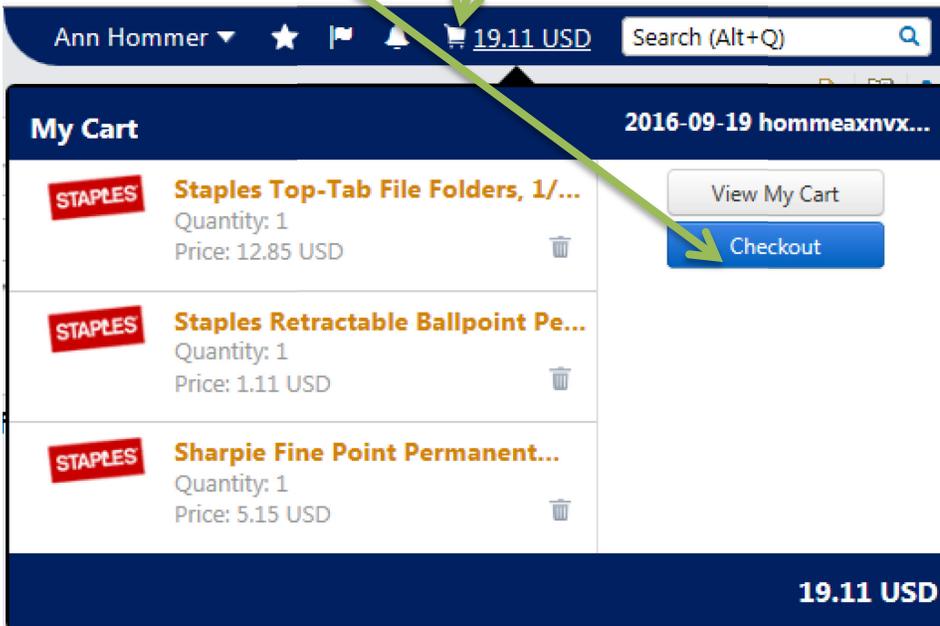


Adding Attachments, Notes, and Comments

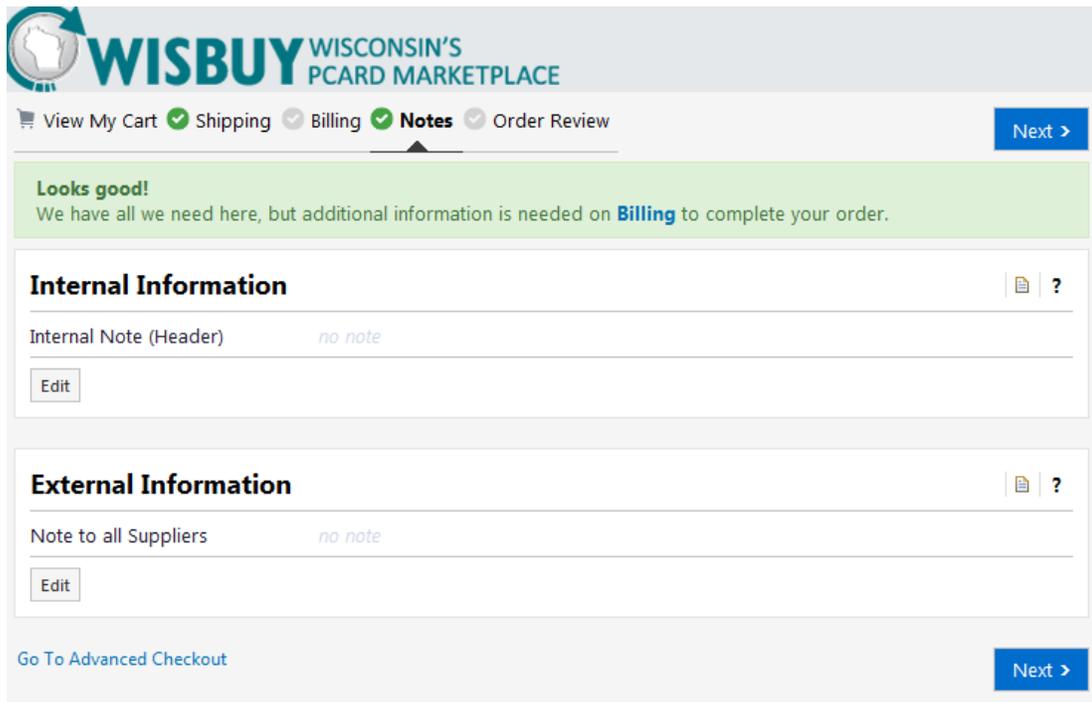
**Including by Line Item*

In this lesson, you will learn how to add attachments, notes, and comments in WISBuy.

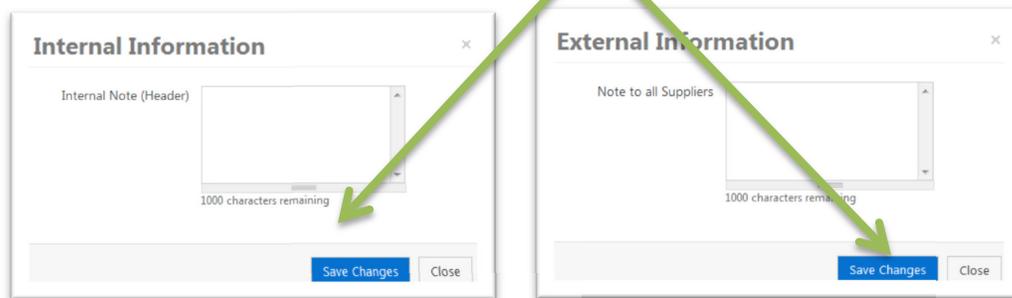
1. At times, it may be necessary to include additional information to support your purchase. In this demonstration, you have put all the items that are needed in the cart and are ready to proceed to checkout. Click the **shopping cart icon** in the upper right corner of the page followed by **Checkout**.
- 2.



3. You can add internal and external note here at the “**Express Checkout**” by clicking on the “**Notes**” Link after the checkmark.



Click on the **Edit** button to add an internal/external note. A box will appear for you to add an internal/external note. Click the “**Save Changes**” Button to add your note to your entire order.



Follow the next steps to get a detailed view of your order, where you will be able to add attachments, comments, notes per line item, and also alter the shipping address per line item.

4. Click on **Go to Advanced Checkout** in the bottom left corner of the screen.

View My Cart Shipping **Billing** Notes Order Review [Next >](#)

Looks good!
Proceed to **Order Review** to review and complete your order.

Billing Address

Billing address
123 Broad St
Madison, WI 12345
United States
[Edit Address](#)

Credit Card

Cardholder Name c braker
Card Number XXXXXXXXXXXXXXX1111
Card Security Code
Expiration Date 1/2020
[Edit Credit Card](#)

[Go To Advanced Checkout](#) [Next >](#)

Order Summary

Subtotal 1,036.46

1,036.46 USD

- Let's first start by adding an attachment to our active cart. You can use this feature to include additional information such as a justification or document showing approval to purchase. For example, you can include an email from your supervisor stating that you have permission to purchase items that you don't typically purchase.

Shop > My Carts and Orders > Open My Active Shopping Cart > Summary - 1101702 - Draft Requisition

Shipping Address Billing Address Payment Information Final Review [Place Order](#) or [Assign Cart](#)

[Go to Express Checkout](#) [Return to shopping cart](#) [Continue Shopping](#)

All done! The required information has been completed and your order is ready to be submitted.

Click **Place Order** once you have verified that everything is correct.

Requisition [PR Approvals](#) [Comments](#) [Attachments](#) [History](#)

Summary Shipping Address

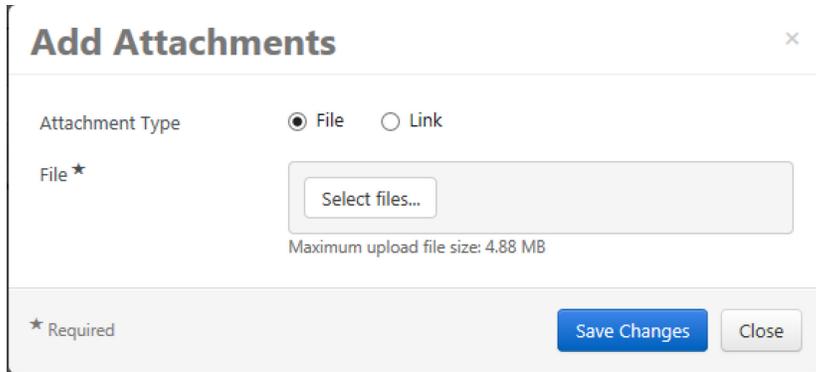
Hide header Hide value descriptions

General	Shipping Address	Billing Address	Payment Information
Business Unit Bureau of Procurement (PROCURE) Prepared by c braker Prepared for c braker Internal Attachments <input type="button" value="add attachment..."/> Internal Note (Header)	ATTN: c braker Division/Bureau 6 flr. to right Room/Floor 1 DOTY ST Madison, WI 12345 United States	123 Broad St Madison, WI 12345 United States	Cardholder Name c braker Card Number XXXXXXXXXXXXXXX1111 Card Security Code Expiration Date 1/2020 manage your cards...

Supplier / Line Item Details

- To add an attachment, click on the **add attachment** link in the general box on your summary screen.

7. Select the file type you wish to upload, file name, and browse your computer to for the file. Click Save when finished adding all attachments.



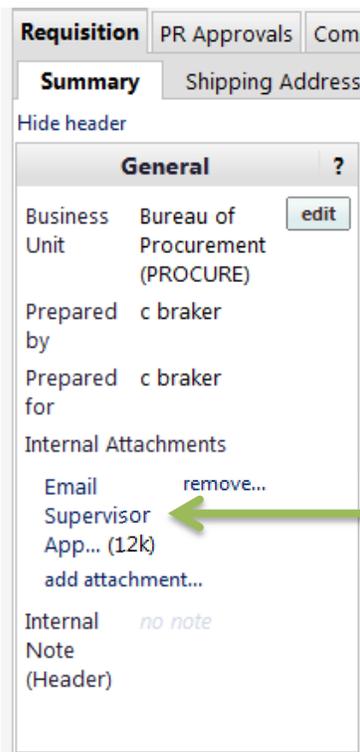
Add Attachments [X]

Attachment Type File Link

File *

Maximum upload file size: 4.88 MB

* Required



Requisition PR Approvals Com

Summary Shipping Address

Hide header

General ?

Business Unit Bureau of Procurement (PROCURE)

Prepared by c braker

Prepared for c braker

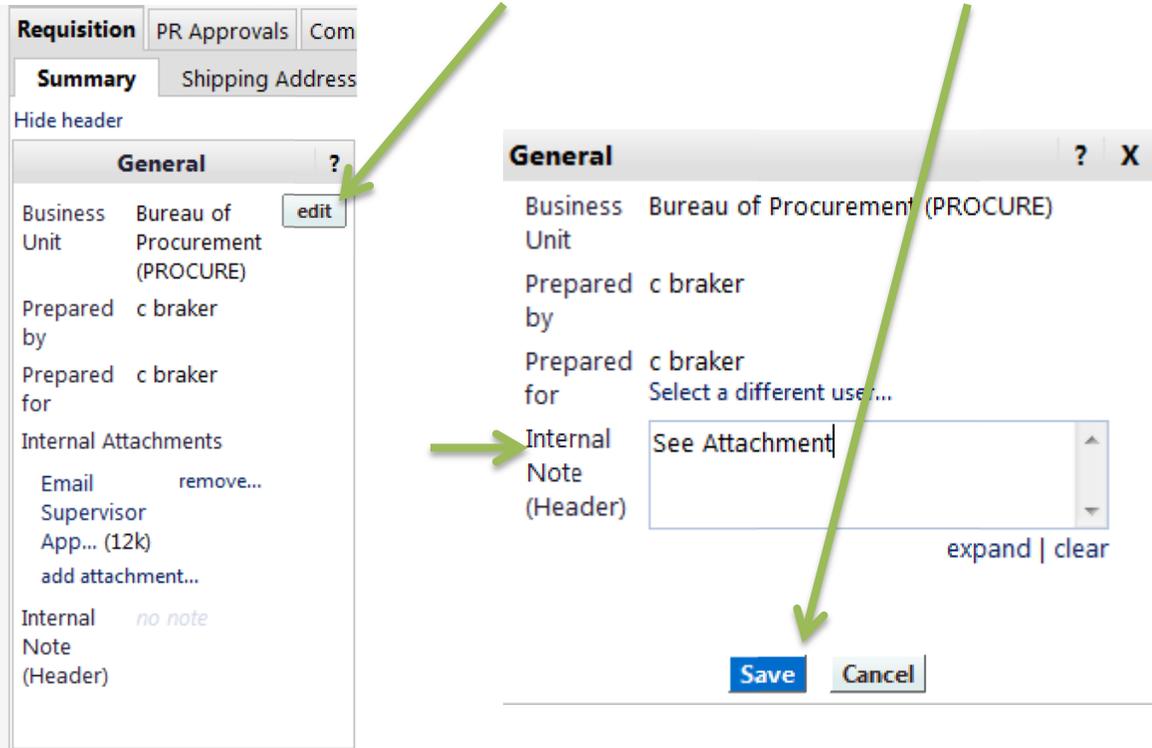
Internal Attachments

Email Supervisor App... (12k)

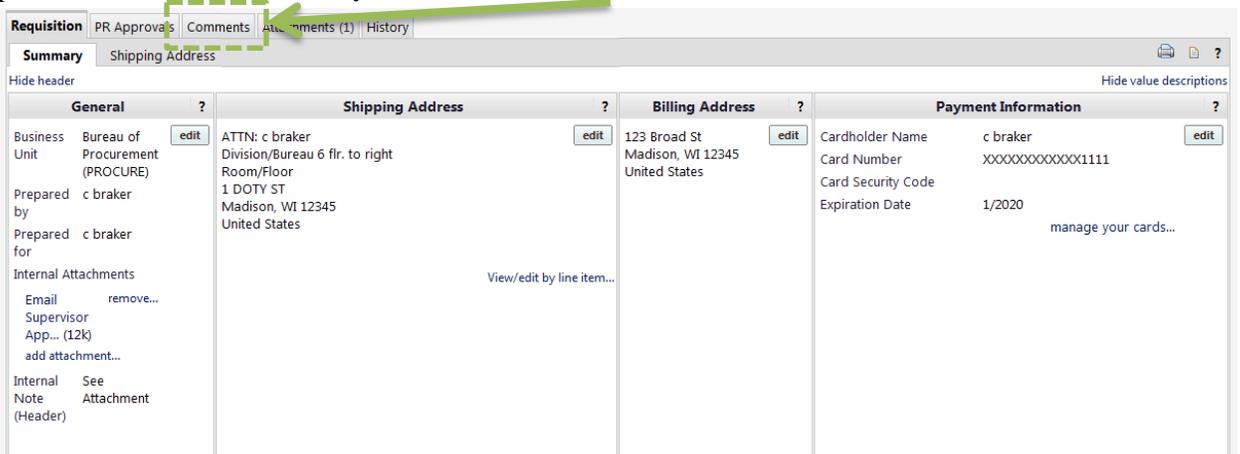
Internal Note (Header) *no note*

You will see your attached document.
You can continue to add another document or remove any unnecessary documents.

- Next, I'd like to add a note about the order. Internal notes only will be seen by staff within WISBuy, not by the suppliers, and also will show up as comments. In the Internal Notes section of the general box, click **edit**. Add the note and then click **Save**.



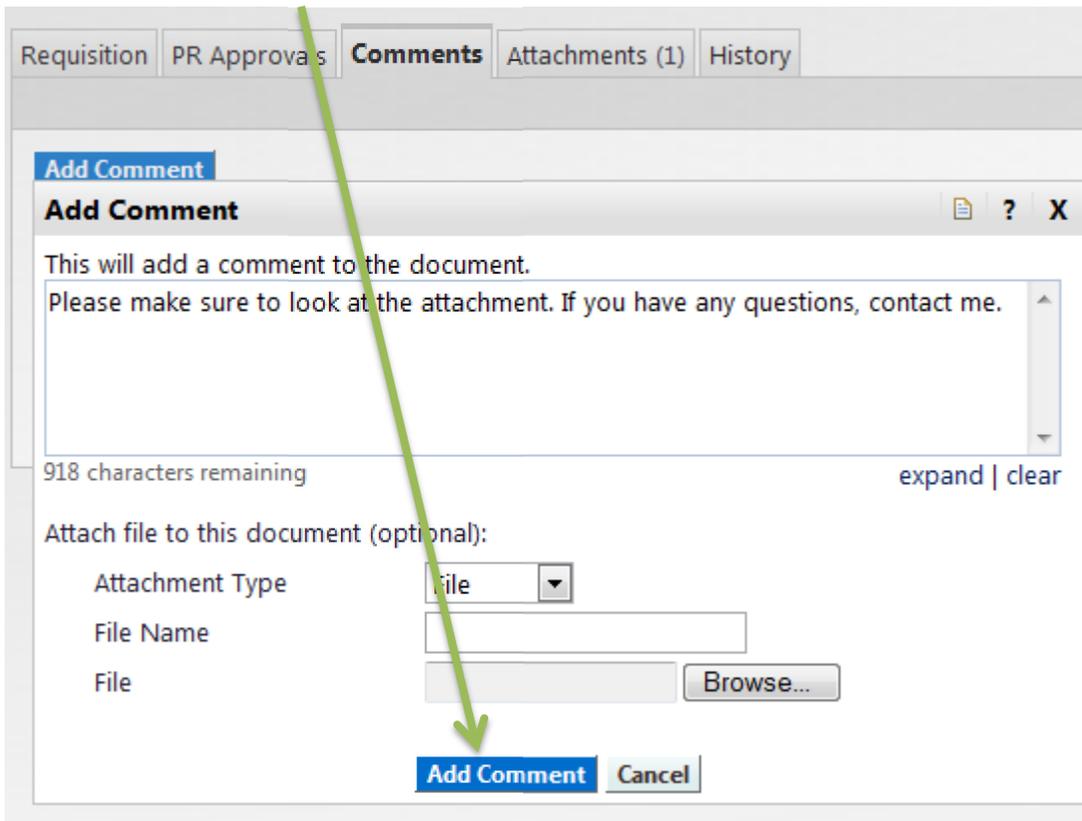
- You can add comments to any requisitions or WISBuy orders. Comments are typically used as a communication tool between users and other State of Wisconsin personnel. For example, a purchaser without a pcard may assign a cart to a purchaser with a pcard to complete the order, and comments can be used to explain the purchase. You can use the Add Comment function to get the necessary information, which will then be included as part of the requisition history. Click on the **Comments** tab.



10. Notice that if comments have already been made against this document, you will see them listed here. Click on the **Add Comment** button.



11. Enter the comment text. You also can attach files in the comments area. When you have finished, click **Add Comment**.



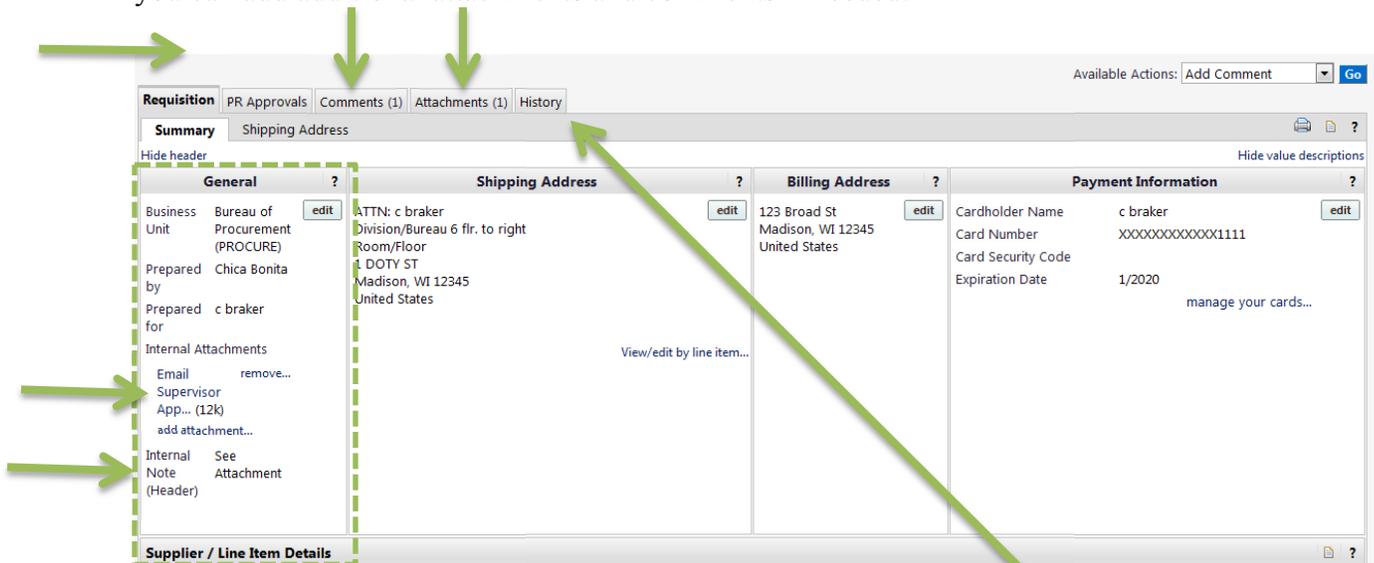
12. The system sends the selected user an e-mail with a link that directs them to the draft shopping cart where they can view the carts items.



13. The selected user simply clicks on the notification link in the top right corner to open the cart details to view any attachments and comments added to the cart.

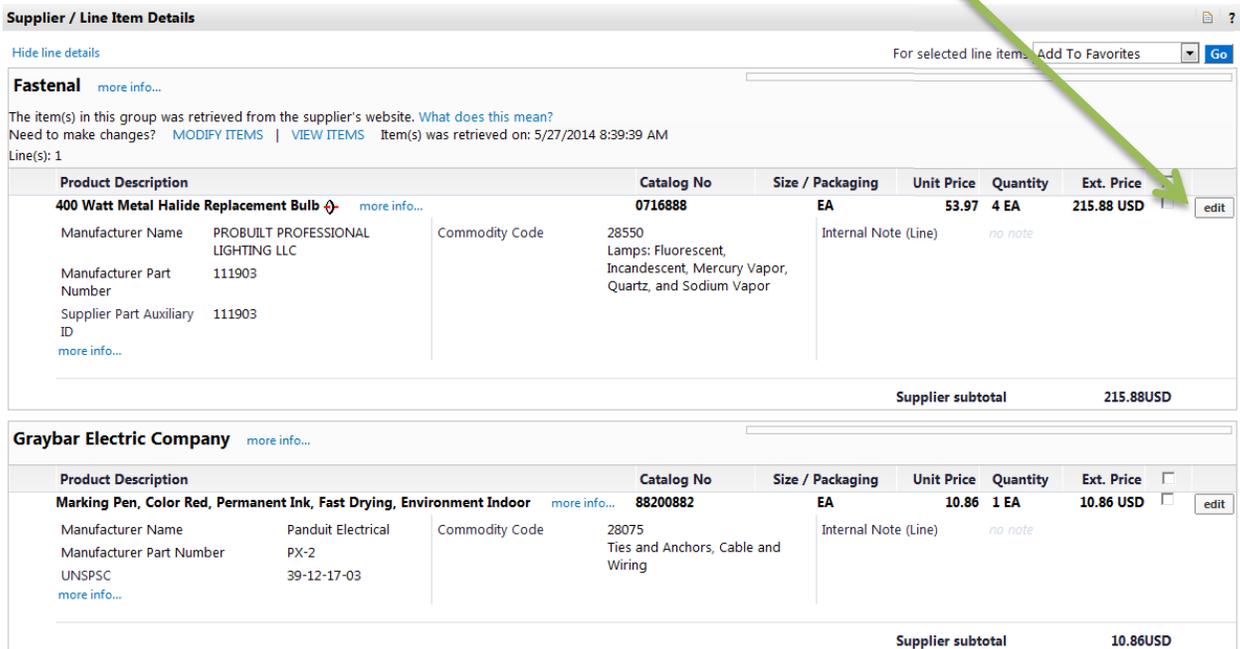


14. After you open the cart, look in the **General** box for any attachments or notes, and also look at the **Comments tab**, prior to proceeding with review of the WISBUY Order. Here you can add additional attachments and comments if needed.

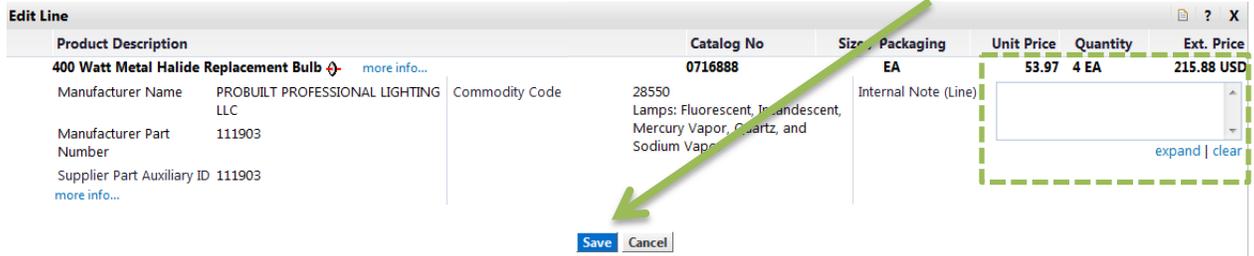


15. Note: All of the comments and attachments become part of the document **history**.

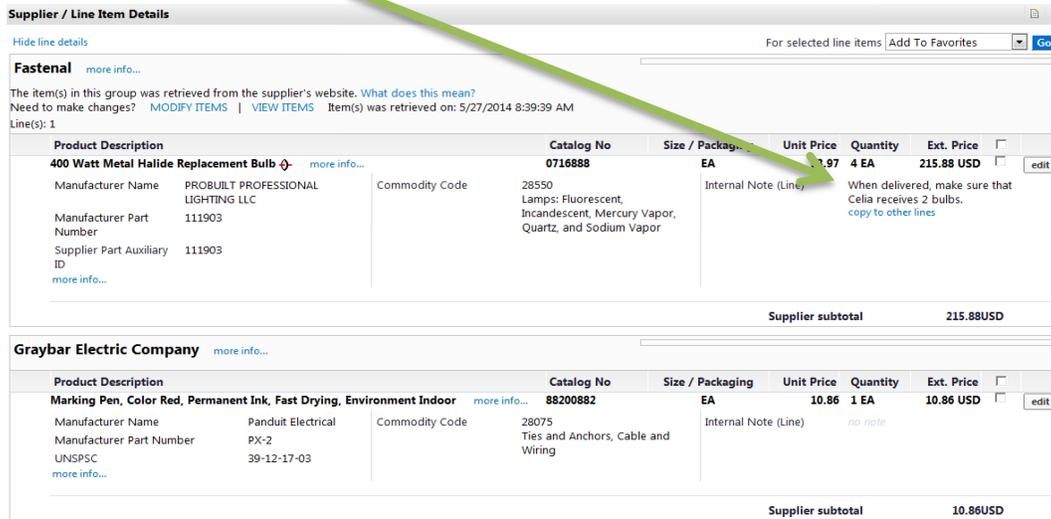
16. To add an internal note per line item, scroll down on your “**Advanced Checkout**” screen to view all products in your cart. On the right-hand side you’ll see an “**edit**” button. Click on the edit button to the item you would like to add a note to:



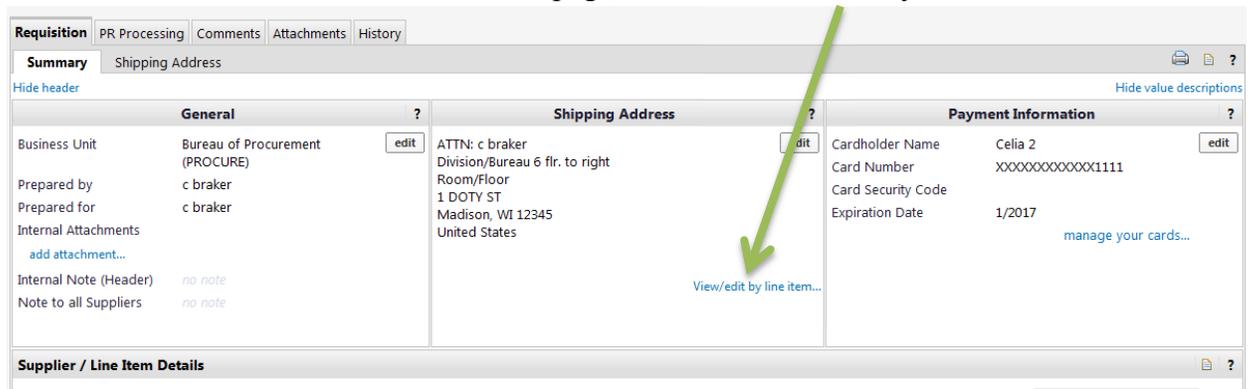
17. A box will appear for you to add a note. When completed click on the “save” button.



18. You will see your **internal note** for the specific item added to that specific line item.



19. To alter a line items address, scroll up to view your “**Requisition.**” In the “**Shipping Address**” box located in the middle of the page, click on “**view/edit by line item...**”



20. You will be prompted to a new screen where you have the option to “edit” the shipping address of each item in your cart. This is a nice feature for when you are ordering for another location/office. Click on the “edit” button on the item you would like shipped to an alternative address.

Requisition PR Processing Comments Attachments History

Summary **Shipping Address** Hide value descriptions

Shipping Address ?

These values apply to all lines unless specified by line item

Shipping address ATTN: c braker
 Division/Bureau 6 flr. to right
 Room/Floor
 1 DOTY ST
 Madison, WI 12345
 United States

For selected line items

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
Fastenal more info... 400 Watt Metal Halide Replacement Bulb more info...	0716888	EA	53.97	4 EA	215.88 USD	<input type="checkbox"/>
Shipping Address (same as header) <input type="button" value="edit"/>						
Supplier subtotal					215.88USD	

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
Graybar Electric Company more info... Marking Pen, Color Red, Permanent Ink, Fast Drying, Environment Indoor more info...	88200882	EA	10.86	1 EA	10.86 USD	<input type="checkbox"/>
Shipping Address (same as header) <input type="button" value="edit"/>						
Supplier subtotal					10.86USD	

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
MSC Industrial Supply Company MRO more info... Combination Wrenches; Tool Type: Combination Wrench NonRatcheting; Number of Points: 00153718 12; System of Measurement: Metric; Size: 1700 mm; Overall Length Inch: 83/4; Finish/Coating: Satin more info...	00153718	EA	11.12	1 EA	11.12 USD	<input type="checkbox"/>

21. You will be prompted to edit the current address (i.e. alter the attention line/change the floor number) or choose another address.

Edit current shipping address...

Fields in **bold** are required for checkout.

ATTN:

Division/Bureau

Room/Floor

Address Line 1

City

State

Zip Code

Country

Save this address for future use

Always make sure to click on the "Save Changes" Button after you made changes.

Or choose from your addresses...

★ **Default**

c braker

6 fir. to right

[Room/Floor]

1 DOTY ST

Madison, WI 12345

United States

Your current default address

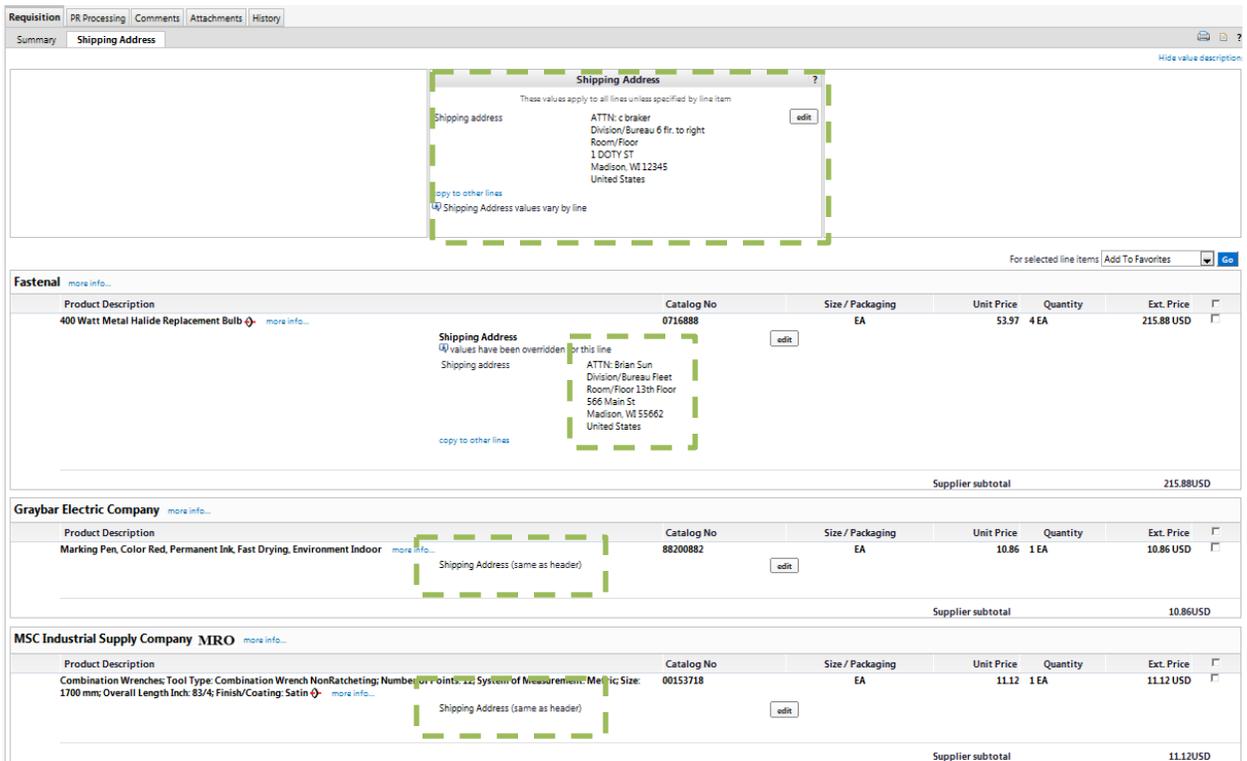
You will also have the option to "Use" a saved address or to select a different address. Click on the "Use" button if you want to use that particular address.

Or select a different address...

Fields in **bold** are required for checkout.

<p><input type="button" value="Use"/> Ad and Fin LAX</p> <p>[ATTN:]</p> <p>ST OF WI-DEPT ADMIN & FINANCE</p> <p>[ROOM/FLOOR]</p> <p>855 EAST AVE N</p> <p>LA CROSSE, WI 54601</p> <p>United States</p>	<p><input type="button" value="Use"/> Default</p> <p>[ATTN:]</p> <p>[Division/Bureau]</p> <p>[Room/Floor]</p> <p>1 DOTY ST</p> <p>Madison, WI 12345</p> <p>United States</p>	<p><input type="button" value="Use"/> Main St</p> <p>[ATTN:]</p> <p>[Division/Bureau]</p> <p>[Room/Floor]</p> <p>566 Main St</p> <p>Madison, WI 55662</p> <p>United States</p>
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22. After you select the appropriate address, you will be returned to your “**Advanced Checkout**” screen, where you will see that for the one line item, it is going to be shipped to an alternative address than the rest of your order.



The screenshot displays the 'Advanced Checkout' interface for a requisition. At the top, there are tabs for 'Requisition', 'PR Processing', 'Comments', 'Attachments', and 'History'. Below these is a 'Summary' section with a 'Shipping Address' tab selected. A large dashed green box highlights a 'Shipping Address' pop-up window with the following details:

- Shipping address: ATTN: e brailer, Division/Bureau 6 flr. to right, Room/Floor 1, DOTY ST, Madison, WI 53745, United States
- Buttons: 'edit', 'copy to other lines', and a note 'Shipping Address values vary by line'.

Below this, the main requisition table is visible, showing three line items:

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
400 Watt Metal Halide Replacement Bulb	0716888	EA	53.97	4 EA	215.88 USD
Marking Pen, Color Red, Permanent Ink, Fast Drying, Environment Indoor	88200882	EA	10.86	1 EA	10.86 USD
Combination Wrenches; Tool Type: Combination Wrench NonRatcheting; Number of Points: 2; System of Measurement: Metric; Metric Size: 1700 mm; Overall Length Inch: 83/4; Finish/Coating: Satin	00153718	EA	11.12	1 EA	11.12 USD

Each line item has a 'Shipping Address' field with a dashed green box around it, indicating that the address is being overridden for that specific item. The 'Supplier subtotal' for each item is also shown.

This concludes the lesson on Adding Attachments, Notes, and Comments in WISBuy. For further assistance, please contact doawispro@Wisconsin.gov or visit the website.